

**USER GUIDE TO
BUILDING WEB SCHEDULING
WITH CHANGES INCORPORATED
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HOW DO I GET TO WEB SCHEDULING

To get to the Web Scheduling use your favorites link to Safety & Buildings Home Page (search the internet for <http://www.commerce.state.wi.us/SB/SB-HomePage.html>), then click on the “Plan Review” box, then scroll down and click on “Online Request for Commercial Buildings Plan Review Appointments”. Note **You need to allow pop-ups to use this application.**

WHAT APPOINTMENTS CAN BE MADE VIA WEB SCHEDULING?

Currently plan review appointments for new buildings, additions, and alterations and subsequent submittals (HVAC, Fire Alarm, Fire Suppression, Kitchen Hood, Petitions) to complete that building, addition, or alteration can be scheduled through Web Scheduling.

Note: This scheduling system **does not support the submittal of revisions** to existing approved plans or **HVAC submittals where there is no related building alteration plan..** Both of these require submittal of form [SBD-118](#). Also both may be scheduled by completing the form and faxing it to 877-840-9172 or emailing it to planschedule@commerce.state.wi.us.

Also note: subsequent structural components submittals are never pre-scheduled for review. Just send in your structural component plans to the Madison office unless otherwise requested in your building approval letter.

We intent to expand the web scheduling feature for plumbing appointments and for Soil Erosion Electronic Plan Review/ Notice of Intents by the end of 2006.

HOW DOES THE WEB SCHEDULING SYSTEM WORK?

Electronic Application Form

Web Scheduling is simply an electronic application form that allows the user to fill in the required information at their convenience using a mix of dropdowns and text boxes that filter subsequent screens to customize the application form.

The “Tasks” system is utilized to collect General Project information (Task 1), Customer information (Task 2), Specific Project information (Task 3) and allows an electronic form to be created for **user proof reading** prior to submittal (Task 4).

Note: IT IS VERY IMPORTANT TO PROOF READ. This submittal affects the fee calculation for your project and also affects reviewer time estimates and may cause a re-schedule of your request if not enough reviewer time has been allocated due to miscommunication.

Acceptance into Our Database

Your electronic submittal is then reviewed by plan entry staff in any of our six offices who compare to see if the site and customers have already been entered into our database or new ones need to be created. They also screen for incomplete information . Plan entry then accepts the information into our database.

Fee Calculator/ Time Calculator

Upon acceptance by plan entry, the data that you entered is fed into an access database that calculates your fee and the estimated time that it will take the plan reviewer to review your submittal. This information is then fed into the database.

Note: one of our next projects will be to offer billing for plan review fees to allow you to submit plans without waiting for your checks to be cut and also to better handle fee shortages and overages. We hope to have this feature before the end of 2006.

Assignment to a Reviewer

Based on the office you chose, the date that you indicated plans would be in our office, the engineering complexity of the project, and the estimated review time compared to reviewer available hours, plan entry selects a reviewer and assigns the plan. Plan entry will attempt to honor the requested office and appointment dates, however if the next available appointment is beyond your requested date, requested office workload drastically unbalanced, or the reviewer unavailable for an extended time period, adjustments will be made.

Confirmation Letter/Application Form.

Plan entry then takes a SCHEDULE Action which creates the application form indicating the review date, reviewer, office, and estimated fee for your project. This is then emailed to the address you indicated on Web Scheduler. It also activates the Status Check feature where the designer can check the status of the plan via

<http://www.commerce.state.wi.us/SB/SB-DivReviewStatusSearch.html> .

Plan Submittal and Review

The applicant then attaches the Confirmation Letter/Application Form to the plans and arranges to have the **plans in the designated review office 2 days before the appointment date**. Plan entry then processes the plan and fees, pulls any necessary related plans from storage, and gives to the reviewer. The reviewer then begins the review on the appointment date. Depending on the estimated review time, quality and unique complexity of the submittal, additional information that may be faxed in, other projects also scheduled for that day, etc the review may be completed on the appointment date or a few days later. The designer (if he/she has an email address in our database) will receive an emailed letter of approval upon review completion. Or, in cases where the plans are held for additional information, you will receive a phone call with follow-up letter if the hold cannot be resolved by phone/email/fax. *Note to designer—if the footing and foundation plans are satisfactory but the plan is being held to resolve other reasons, you may request that the reviewer take an Additional Information Request/Footing & Foundation approval action to allow you to start the project.*

WHAT IS IMPORTANT FOR ME TO KNOW WHEN FILLING OUT THE WEB SCHEDULER INFORMATION?

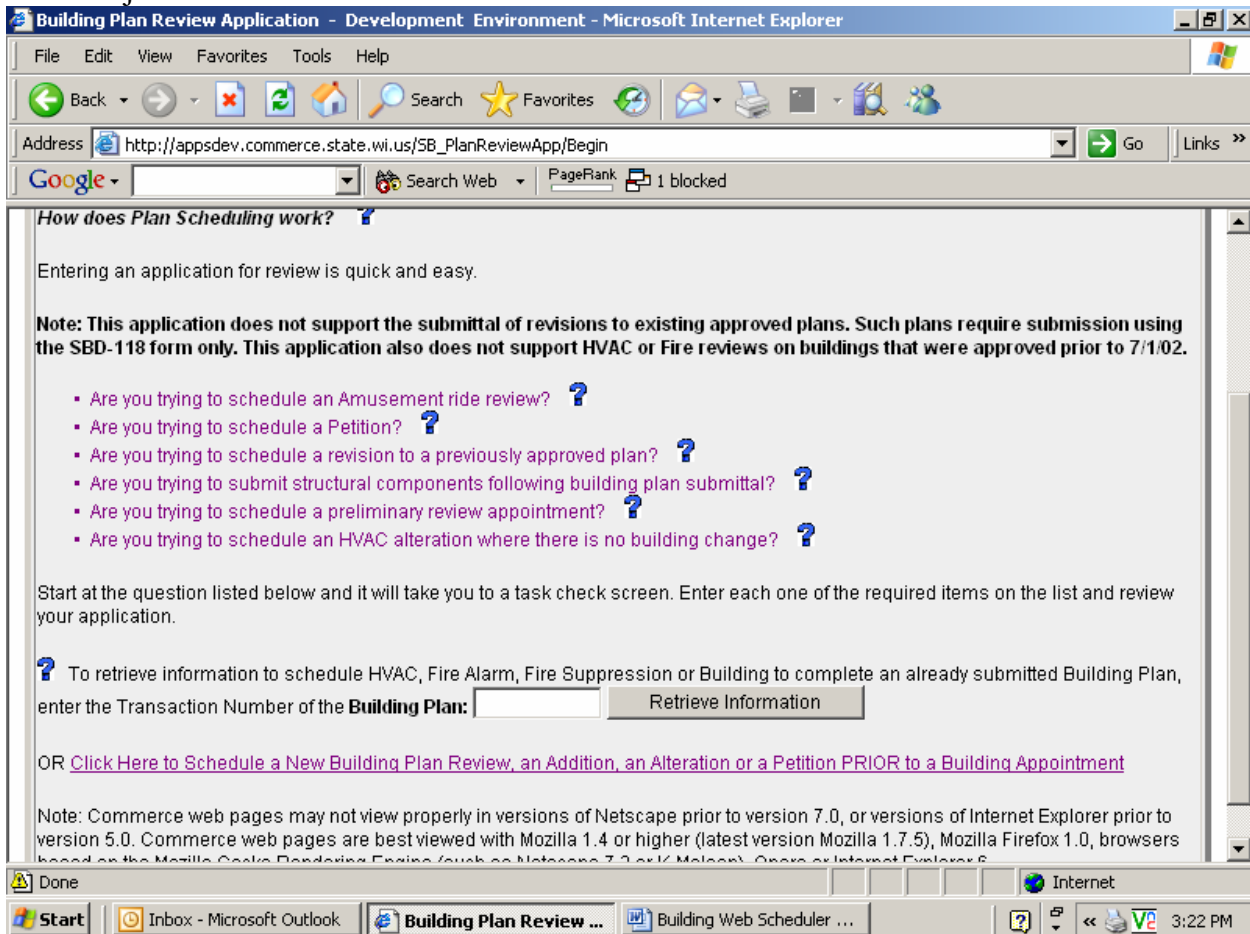
The Symbol * means that it is mandatory information

The Symbol ? is a help button that, when clicked on, further defines the information requested or gives directions on how to deal with that aspect..

Web Scheduling has 2 paths to create the “application form”.

- The first path is to use the “**Schedule a New Building Plan Review**” for the initial submittal of a project. This initial submittal could be a petition, a footing foundation submittal, the typical building structural and architectural , or a footing & foundation and structural shell submittal. Commentary below on this path is indicated as **NEW**.
- The second path is to use the “**Retrieve Information**” “for subsequent submittals to complete that building---HVAC, fire alarm, fire suppression, kitchen hood, interior bleacher, building architectural review following a petition or footing & foundation review, etc. Commentary below on this path is indicated as **RETRIEVAL**.”

The tasks to use these two paths are similar but slightly different enough that incorrect use could cause major miscommunication.



NEW

NEW TASK 1

The Task 1 screen will appear as below.

Building Plan Review - Test Environment - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites RSS Print Mail News Groups

Address http://appsdev.commerce.state.wi.us/SB_PlanReviewApp/Bldg/BldgPlan?ptid=0&wprid=0&webRegObj=0 Go Links

Google Search Web PageRank 1 blocked

Step 1) Enter Your Building Plan Review Information (Starred (*) entries indicate must be filled in)

Review Office*: <Select One> Date Plans will be in a Safety & Buildings Office*: mm/dd/yyyy

Display Next Available Appointment in Each Office

Have You Submitted Plans within the Last 2 Years*: <Select One> Plan Type*: <Select One>

If you want confirmation of the appointment you must enter an e-mail address: E-mail:

Will this submittal include a Petition*: <Select One>

Scope of Service Requested*: <Select One>

State of Wisconsin Owned*: <Select One>

If Known, Site ID from Previous Submittal:

Project/Site Name*:

Street Address/General Location*:

County*: <Select One> Municipality*: A County Must be Selected to Display Municipality List

Done Internet

Start Inbox - Microsoft Outlook Building Web Scheduler ... Building Plan Review ... 4:35 PM

The task 1 requests for information as shown in bold below are essential for you to understand.

SCOPE OF SERVICES

Understanding the Scope of Services is very important since this is the **main filtering feature of the scheduling system**. Building application requests can be made for the project in its entirety or in phases to match the design and construction timeline for that project. See the table on the next page for your options and what effects that option has.

Note: once the first submittal for the new building, addition, or alteration is made, **use the Retrieval feature** by entering the previous transaction number for the building and clicking on the **Retrieve Information** button. This autofills in most of the information for you and coordinates the project data for us.

Scope of Service Requested	What does this Mean	The Review Appointment will be for	Also allows you to include the following <u>with this submittal</u>.
Building and Architectural Review	This is the normal submittal for the general building structural and architectural review . Plans include the building footing & foundation, structural, and architectural plans. HVAC and structural components such as truss and pre-cast concrete may be submitted later or with these plans.	Review of the building architectural and structural plans	HVAC, Fire Suppression*, Fire Alarm*, interior bleacher, kitchen hood, trusses, pre-cast concrete, laminated wood, pre-engineered metal building, steel girder. Petition for variance <u>IF</u> you selected the “Petition with Plans” option. *If fire alarm or suppression plans are included only Waukesha or Green Bay offices may be selected.
Combined: Footing & Foundation + Permission to Start	You are submitting ONLY footing and foundation plans at this time and wish to obtain a permission to start at your own risk while waiting for footing and foundation review.	Review ONLY for footing and foundation plans	Nothing else except Petition for variance <u>IF</u> you selected the “Petition with Plans” option.
Combined full Building review + Permission to Start	You are submitting the building structural and architectural plans . Structural components may be submitted at this time or later. You also wish to obtain a permission to start at your own risk while waiting for this review.	Review of the building architectural and structural plans	HVAC, Fire Suppression*, Fire Alarm*, interior bleacher, kitchen hood, trusses, pre-cast concrete, laminated wood, pre-engineered metal building, steel girder. Petition for variance <u>IF</u> you selected the “Petition with Plans” option. *If fire alarm or suppression plans are included only Waukesha or Green Bay offices may be selected.
Combined Structural Framework and Footing & Foundation	You basically desire to construct the building structural shell prior to submitting architectural plans.	Structural review of the footing & foundations and the building shell structural system. No architectural plan review.	Trusses, pre-cast concrete, laminated wood, pre-engineered metal building, steel girder. Petition for variance <u>IF</u> you selected the “Petition with Plans” option.
Combined	You basically desire to construct	Structural	Trusses, pre-cast concrete,

Structural Framework and Footing & Foundation + Permission to Start	the building structural shell prior to submitting architectural plans. You also wish to obtain a permission to start at your own risk while waiting for this review.	review of the footing & foundations and the building shell structural system. No architectural plan review.	laminated wood, pre-engineered metal building, steel girder. Petition for variance IF you selected the “Petition with Plans” option.
Footing & Foundations	You desire to have ONLY the footings and foundation plans reviewed and intend to submit the rest of the building structural and architectural plans later.	Review ONLY for footing and foundation plans	Nothing else. Except Petition for variance IF you selected the “Petition with Plans” option.
Structural Framework	You have already submitted the footing and foundation plans and wish to continue with the phased review by submitting the plans for the building structural shell ONLY . Architectural plans will be submitted later.	Structural review of the building shell structural system. No architectural plan review.	Trusses, pre-cast concrete, laminated wood, pre-engineered metal building, steel girder. Petition for variance IF you selected the “Petition with Plans” option.

WILL THIS SUBMITTAL INCLUDE A PETITION

This is another important filter that will affect many of the next Web Scheduler screens. The typical response is Not A Petition Request. If you select **Petition Only you will not be able to schedule anything else** on this submittal.

This option can be used in two ways.

- For a petition request prior to scheduling any building plans by clicking on the “Schedule a New Building Plan Review”.
- For a petition request **after** a building plan submittal by clicking on the “**Retrieve Information**”. If you select **Petition With Plans** you will also be able to use the Scope of Services Requested to submit the building or phases of the building with the petition request.

For Petition Scheduling:

- **Enter the code sections being petitioned in the comment box** to better facilitate proper staff assignment.
- Note that the Confirmation/application form you receive indicates that **for a petition the completion of Form SBD-9890X is required to be submitted**. This form can be obtained from our website Forms page at <http://www.commerce.state.wi.us/SB/SB-DivForms.html#general> .
- Note that the Confirmation/application form you receive indicates that the fees for a petition for variance are not included in the calculated plan review fees. You thus must **calculate the petition fees from the SBD-9890X form and add to your plan review fees**.

IF YOU WANT CONFIRMATION OF THE APPOINTMENT YOU MUST ENTER AN EMAIL ADDRESS

In the past we typically defaulted the confirmation email to the indicated designer. However we received many requests to send this to the company's scheduling coordinator instead or in addition to the designer. This field lets you designate the main contact for receiving the confirmation of appointment date and office.

IF KNOWN, SITE ID FROM PREVIOUS SUBMITTAL

If you are starting a new project on the same site as a previous project and know the site number from a previous submittal, this feature will save you time by auto-filling in all the site information. It also helps us coordinate the data. Simply type in the Site Number and click off that box to auto-fill in all the site information.

Note: If you are submitting HVAC etc to complete a building already submitted be sure to start your request by using the "Retrieve Information button using the previous transaction number that auto-fills the site, customers, etc.

OTHER IMPORTANT INFORMATION FROM TASK ONE

Plan Review Available Date

When you click on this button, the table shown indicates our best estimate of the next available date by category and office at the end of the previous business day. Requests for appointments submitted today or plans received in the mail without an appointment may change this status.

Building Submitters Please Note: Normally the same reviewer is assigned to subsequent HVAC and other components after the initial approval. Also fire alarm and suppression reviews are done by a limited number of reviewers in Green Bay and Waukesha only. The next available date in the table may not be applicable in these situations.

Plan Review State-owned

A state-owned building must be reviewed and inspected by the state. Therefore, if your building is state-owned you must indicate that so the responsibility will be directed appropriately.

Plan Review Site

Enter here the site name that will be used to coordinate submittals for all trades (bldg, HVAC, etc.) If the site is a complex of buildings or a building with tenants, you will be asked for specific information about the building in Task 3. It is especially important to give us a defining name for each building if there are or will be other buildings on the site.

Plan Review Address

Enter the street number and name if known. If you do not know the street number provide the street name, nearest street name, or legal description.

Plan Review Municipal

Click on the County dropdown, select the county, then move the cursor to populate the list of municipalities in that county. Then select the appropriate municipality.

County and City, Village or Town information is critical. This refers to the project geographical location, not to the building mailing address. This information is used to determine which Governmental Unit receives a copy of the Plan Review Letter and to determine if a State Inspector will inspect the Project or if it is within a Certified Municipality. For example, a Project might have a La Crosse Mailing Address, but be actually located in a surrounding Township. That will affect the fees paid for the State Plan Review & Inspection Service and also affect which Governmental Unit will issue the Building Permit. Incorrect Information at this point can lead to costly delays further down the Permitting Process.

Plan Review Comments

You can use this space to communicate unique project information regarding your plan scheduling. Example: You are requesting a specific reviewer because(indicate why).

Also if you are **scheduling a petition be sure to enter the code section petitioned** in the comment box so the appropriate reviewer can be assigned.

Have You Submitted Plans in the Last Two Years?

Typically review of plans prepared by infrequent submitter takes considerably more time. Answering a no to this question adds to the estimated review time.

NEW TASK 2

Entering Customers

Whenever possible use the “Retrieve” button, as shown on the screen print on the next page, by entering in known Safety & Building customer numbers.

This will auto-fill in the information without typing (and eliminates errors) plus if you have multiple addresses with Safety & Buildings you will be able to chose the appropriate address. If any of this retrieved information is in error or out of date please notify us via email at planschedule@commerce.state.wi.us

Buildings Plan Review Application - Test Environment - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites RSS Mail Print View Source

Address http://appsdev.commerce.state.wi.us/SB_PlanReviewApp/AddCustQ1 Go Links >>

Google Search Web PageRank 1 blocked

commerce.wi.gov
Wisconsin
Department of Commerce

Add Customer - Step 1

Do you have a Commerce Customer ID for the person you want to enter?
Enter Customer ID and click retrieve.

Customer ID : Retrieve *This will aid in data entry by auto inserting customer information on the following pages*

OR

No, I do not know a Commerce Customer ID Add Customer [Click here to Exit](#)

Done Internet

Start Inbox - Microsoft Outlook Building Web Scheduler ... Buildings Plan Review... 4:44 PM

If you do not have a customer number be sure to **have all of the information ready** for all of the customers before you begin entering your appointment request on the web. See the screen on the next page for requested new customer information.

On the screen above, it is very **important that you indicate the appropriate customer relationship for all objects being submitted for this request**. A **designer indication is required** for the objects being submitted. If the project is greater than 50,000 cubic feet a **supervising professional** indication is required. Failure to do so at this stage will prevent completion of Task 3 without returning to this page to add the relationship.

Also note that if the customer includes a **designer** indication the “Are you a Wisconsin Engineer, Architect, or HVAC Designer” **question must be answered**. Typically plans prepared by others takes more review time, thus answering a no to this questions adds to the estimated review time.

NEW Task 3

Details of the objects that you are requesting to be reviewed.

This screen has **many variations** of requested information based on:

- whether you have started the request as a New project or selected Retrieve Information to complete a project.
- which of the Scope of Services Requested that you indicated in Task 1. See the table above under Scope of Services for information on what the various displays may be.

Building Object Information - Development Environment - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites RSS Print Mail News Groups

Address http://appsdev.commerce.state.wi.us/SB_PlanReviewApp/Bldg/BldgObjCompStart Go Links

Google Search Web PageRank 1 blocked

Building Details:

Type of Building*: <Select One>

Is Total Building Volume Less than 50,000 cu. ft.*: <Select One>

Occupancy Type (Major Use)*: <Select One>

Number of Additional Occupancies: (To select more than one, hold the Ctrl key down while selecting with the mouse)

A-1 Theater Assembly
A-2 Dining & Drinking
A-3 Other Assembly Uses
A-4 Indoor Sports Seating
A-5 Outdoor Sports Seating
B Business

Construction Class*: <Select One>

Area (project area, include all levels)*: sq. ft. Do Not Use Commas

Number of Floor Levels*:

Number of ADDITIONAL Identical Buildings:

Tenant Name or Addition/Alteration Description:

Select Objects/Structural Components Submitted with THIS Review (Check all that apply). Do NOT check if submitting later.

☐ HVAC Sq. Ft. ☐ Fire Suppression Sq. Ft. ☐ Fire Detection/Alarm Sq. Ft.

☐ Interior Bleacher ☐ Floor Truss ☐ Kitchen Exhaust Hood ☐ Laminated Wood

☐ Metal Bldg ☐ Precast Plank ☐ Precast Wall ☐ Roof Truss ☐ Steel Girder ☐ Petition

NEXT Enter Building Designation

[Click here to Cancel this Screen](#)

Done Internet

Start Inbox - Micros... Building Plan ... Building Obj... PETITION WE... Building Web ... 3:14 PM

For example, **if you select Petition with Plan Submittal Request** and from the Scope of Services select **Building and Architectural Review**, the resulting screen above will display **all of the possible selections**. Be sure to check **ONLY** those items that will be including with the submittal that you are scheduling now. Also note that even though you indicated Petition with Plan Submittal, **you must also check the petition box on this screen**. IF the petition will be for this building.

Some Scope of Services Requested will give you very few elements to choose from. For example **if you chose Not a Petition and Structural Framework** you would get the choice only of structural elements to schedule. See next page.

VERY IMPORTANT TO NOTE

If this submittal is for a tenant space build out or for an addition or alteration, **be sure to enter the Tenant Name or Addition/Alteration Description** on this screen. That will be a primary factor in correlating subsequent submittals for that project, compliance statements, informational searches and your retrievals for scheduling.

If you **wish to submit multiple buildings on the same submittal** you have two options, depending on the situation: Both options may be used on the same submittal transaction.

- for **identical multiple buildings**, just indicate the number of additional identical buildings on this screen. (Note that if you have 3 identical buildings you would enter **2** as the **additional** identical buildings)
- for **non-identical buildings** After you have completed all the information for the first building, click on the “Save Building and Go to List”, then click on the “Add Building” button again and proceed to indicate the information for the next building. Repeat as necessary.

ALSO VERY IMPORTANT FOR FEE CALCULATION

Fees are determined by project area being submitted. In the Area (project area, include all levels) field be sure to indicate the sum of the area in this building that this submittal entails. E.g.

if you are altering or adding 500 sq ft, enter 500 sq ft, not the area of the entire building. Likewise in the HVAC, Fire Suppression, Fire Detection/Alarm portions only enter the area being served by those systems. E.g. if you have 10,000 sq ft apartment building of which 3,000 sq ft is an unheated garage, only enter 7,000 for the HVAC sq ft.

For objects such as HVAC, Fire Suppression, Fire Detection, interior bleacher, trusses, precast, laminated wood, metal building steel girder **ONLY INDICATE THOSE THAT ARE PART OF THIS SUBMITTAL REQUEST. If you are going to submit them later do NOT check them now.**

NEW TASK 4 PROOF READ & SUBMIT

As previously mentioned, it is **very important to proof read** this since the data indicated affects the estimated review time and thus may necessitate a reschedule to the next available appointment if the submitted plans differ from the requested appointment. Also fees are calculated based on what is indicated.

Shortly after Submittal you will be emailed a confirmation letter/ completed application form which includes the fee, appointment date, and assigned reviewer. If you are in a hurry and want to calculate the fees yourself you may print out the form created after submission, that has the assigned transaction number, and send in the plans immediately.

Note that Comm 2.31(2M) allows the department to charge a \$50 fee for a missed appointment. If for any reason you can not make your appointment be sure to call the assigned office to re-schedule to a date you can make.

Retrieve Information

Begin by entering the **transaction number** of the **building plan submittal** and clicking on the Retrieve Information button.

Retrieve Information Task 1

Note the **office has been auto-filled** from the original transaction. This office must be used **unless the requested appointment is for a fire alarm or fire suppression** plan which currently can only be reviewed in the Green Bay or Waukesha office.

For **Scope of Services** the typical entry for most plans should be “**No Additional Services**”. The exceptions would be for phased projects where the building plans have not yet been submitted (e.g. the previous transaction was for a petition, footing & foundation, or footing & foundation + structural framework. You could also enter the transaction number of a previous preliminary review.)

Retrieve Information Task 2

Note that the **owner is carried over** from the previously submitted transaction. Be sure to add the **designer** for the current appointment request and the **supervising professional** if applicable.

Retrieve Information Task 3

On task 3 all the buildings from the previously submitted transaction will appear.

- Select the building that you are scheduling HVAC, etc for
- click on the regulated object number
- check the object or objects that you plan to submit on **this** transaction.

Retrieve Information Task 4

This task is the same as New Task 4.

Hopefully you will find Web Scheduling very efficient and user friendly.